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**NSDA
Sales Survey of the
Soft Drink
Industry**

1985

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FOREWORD

Each year the National Soft Drink Association presents this review of the industry's sales performance based on a survey of Association members and other soft drink manufacturers and distributors.

As in the past, the survey reflects changes in the industry with new flavor categories and package types. NSDA has also added more detail on delivery, seasonality, and the payment of Federal vehicle taxes.

NSDA's standard procedure for conducting the survey is to request the data on a state-specific sales basis. The focus is on sales, although production data are requested in a separate section on each survey form.

In the cases where organizations have multiple facilities or distribution locations, survey forms are mailed to corporate headquarters. Companies receive one form for each state in which they do business. This includes states wherein a company only distributes; that is, where they do not have either a plant or warehouse.

Responses are confidential. Each form received has its identification removed. The data are entered into the computer and then merged into the proper state files along with the other respondents from that particular state. By policy decision, the forms from multi-state companies are never added together to get a company total. State files are aggregated first into regional data and then into national totals.

Since 1983, when NSDA began conducting the survey in-house, response has increased substantially. In 1983, survey coverage rose approximately 50 percent from 1982. In 1984, survey coverage grew again at 23 percent. This trend continued in 1985 with an increase of 12 percent. The in-house move has resulted in a two-fold increase in survey coverage of bottler sales compared to 1982. Overall, in 1985, for the first time, industry coverage in volume terms exceeds 50 percent of total industry sales.

Respondents had the option again this year to submit their data on diskettes using Lotus 1-2-3. There are two principal advantages to using the diskette. First, it facilitates the preparation of the survey by the bottler by performing many of the calculations required to convert physical cases to gallons and by cross-checking data for consistency and accuracy. Second, since the diskette replaces the form, the data do not have to be hand inputted again upon receipt by NSDA; this greatly enhances the speed and the accuracy of transferring the data into the analysis files at NSDA.

The continued participation by the bottlers in this effort is greatly appreciated. NSDA also is working with companies that provide bottlers with computer software and hardware to further automate bottler completion of the Sales Survey. As a first step, several computer companies have sent instructions to their users outlining what reports to use for each section of the Sales Survey. Next, we hope to see the Sales Survey programmed — or at least major portions of it — directly into the systems. Since most of the data requested on the Sales Survey are already in the bottlers' computer systems this would greatly reduce the time needed to complete the survey.

The information provided by the respondents is used to compute industry-wide and regional sales of packaged goods classified by flavors and by container type; bulk sales classified as pre-mix and post-mix and by flavor type;

packaged distribution channels and bulk distribution wholesale value of soft drink sales from 1984 to 1985 measured in dollars. On a national basis, data are given on the growth in industry employment, average package size and number of packaged units per gallon of sales, per standard 288 oz. case and per dollar of sales. Productivity measured in both gallons and standard cases per employee is also provided.

New in the 1984 survey and continued this year are charts and tables containing information on method of sales for packaged goods, method of delivery, vending flavors, water flavors and types, sweetener usage, market share on a unit basis and vehicle usage.

New data: This year's survey includes several new items. These are highlighted with color shading. To accurately respond to the question "What do bottlers sell?", two flavor categories have been added on both a regular and diet basis — flavored cola and juice added. Seasonality of sales is a question frequently asked of NSDA. Though the expectation has been that the volume of soft drink sales is cyclical, data have not been available to corroborate this. Thus, for the first time, NSDA queried bottlers on "When are soft drinks sold?" In this year's Sales Survey, monthly seasonality indices are provided calculated on physical case sales, standard case sales and on a dollar basis. Each bottler had a choice of how he would answer the question. Last year the survey provided a breakdown of cash versus credit sales. This year an average turnover ratio has been added, defined as accounts receivable divided by net sales. Other new data are type of vending account — full service or third party; post-mix container — tank versus bag in box; average number of stops per truck per day and average size delivery; and average heavy vehicle tax per truck.

As with earlier versions of this survey, the national summary represents an estimate of the total industry's size and growth. Total industry includes bottler sales and sales made principally to the fountain trade by the flavor houses through independent distributors or distributors owned by fast food chains.

While the principal emphasis of the survey is to provide industry "averages," data were given in prior years that characterize the "typical" form received by NSDA. Data developed from this perspective are presented again this year.

It is believed that with the current level of industry response, the NSDA survey has significantly greater coverage than any other published sales survey and, therefore, should provide the user with the most accurate sales-based profile of the industry available. In addition to sales data, the reader is provided with information on employment, productivity and materials used. It is felt that these data, too, have a fairly high degree of reliability.

1985 NATIONAL SUMMARY

As earlier published reports indicated, 1985 was a good year for the soft drink industry. The analyzed results of the 1985 NSDA survey indicate that packaged sales increased by 4.66%. Bulk (fountain) sales increased by 5.22%. The bottler portion rose 4.01%. As a result, industry sales overall were up 4.80%. Total sales were 4,836,730,000 cases of standardized units (288 oz.). The growth was a combination of population (23%) and per capita (77%) increases.

Total wholesale dollar value increased by 8.29% during 1985 led by an increase of 8.65% in packaged sales followed by a 6.45% increase in bulk goods. The estimated wholesale value of soft drink industry sales, measured net of price-off and volume discounts, was \$23,268,791,000. Per capita consumption advanced to 486.2 12 oz. units, an increase of 3.67%.

Average container size decreased from last year. The measured value for 1985 was 16.82 oz. For 1984, it was 17.18. The number of containers filled increased by 3.3%. It is estimated that the industry filled 62.6 billion individual units in 1985. Of these, 10.7 billion represented fillings of refillable glass containers. Of the remainder, 9.8 billion non-refillable glass containers were filled, 4.7 billion plastic units were filled, 37.3 billion can units were filled, and 0.1 billion aseptic units were filled.*

Employment in the soft drink industry grew by 3.53% in 1985; in 1984 it increased 3.4%. The volume of soft drinks sold per bottler employee increased 1.0% in 1985. Concurrently, sales dollars per employee grew at a 4.6% rate. As has been the case in the past, a portion of this productivity increase was passed on to the consumer. It is estimated from data in the NSDA survey that the wholesale price for soft drinks increased by 3.6% for packaged and 1.2% for bulk.

According to the NSDA survey, the average wholesale price for a gallon of packaged soft drinks was \$2.55 (\$5.74 per 288-oz. case), while it was \$.86 for a gallon of bulk measured on a finished drink basis.** On a total industry basis, an average gallon of soft drinks (whether packaged or bulk) wholesaled for \$2.14. For bottlers, the 1985 figure for sales gallons per employee was 59,500. The average number of 288-oz. standard cases per employee was 26,444. For sales dollar per employee, the bottler average was \$134,900.

*There could be a considerable sampling error in the aseptic figure. This is because the sampled volume was very small and, always in such cases, the extrapolation to the population is less reliable than when the sample statistic is larger.

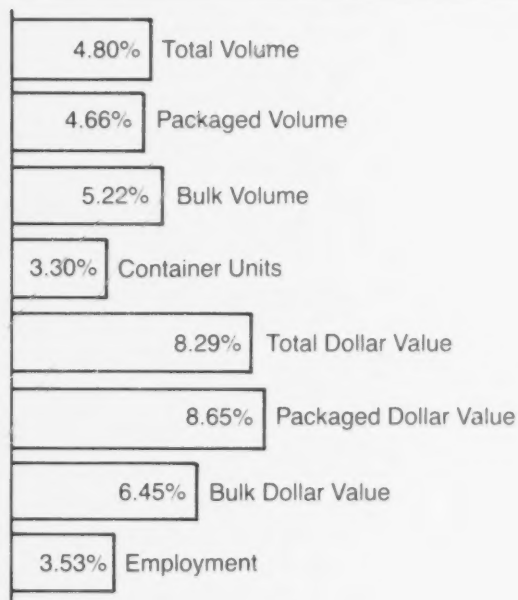
**Converting bulk in finished drink gallons back to syrup at a ratio of 5 parts carbonated water to 1 part syrup yields a figure of \$5.16 for the average bottler wholesale price of a gallon of post-mix syrup.

NATIONAL DATA AND ANALYSES

Responses 271 Estimated Number of Plants 305

A. Summary Data

A.1 TOTAL SALES



A.2 UNIT SALES

Container Units Per Dollar of Packaged Sales	2.98	
	1985	% Change
Container Units Per Gallon	7.60	2.0%
Container Units Per 288 oz. case	17.10	2.0%
Average Container Size (oz.)	16.82	-2.1%

A.3 PER CAPITA CONSUMPTION

	1985	% Change
Twelve Ounce Units	486.2	3.67%

TOTAL SALES

In 1985 total volume (bulk and packaged) grew at a 4.80% rate, with packaged at 4.66% and bulk at 5.22%. The comparable 1984 figures were: total, 7.98%; packaged, 7.07%; and bulk, 10.92%. The number of containers filled in 1985 rose by 3.30%. Total sales of 4,836,730,000 standard cases (288 oz.) represented a wholesale value estimated at \$23.3 billion (\$23,268,791,000). Total wholesale dollars are based on net sales, i.e., less volume discounts and price-off. On a comparable basis, 1984 wholesale dollars were \$21.5 billion (\$21,488,188,000).^{*} Thus, total dollar value rose by 8.29% in 1985. Per capita consumption advanced to 486.2 12-oz. units. For each wholesale dollar of soft drink sales, 2.98 containers were sold to the public.

Turning to productivity, volume sales per bottler employee including all plant, route, warehouse and office personnel averaged 59,500 gallons (26,444 standard 288-oz. cases). This was an increase of 1.0% over 1984. In 1985 sales dollars, net of price-off and volume discounts, averaged \$134,900 per employee. This was an increase of 4.6% over the prior year.^{**}

^{*}An adjustment has been made to the 1984 wholesale dollar figure published last year reflecting the increased reliability of the data obtained on the 1985 survey. See note on the Summary of Sales since 1849 estimates that appears at the end of this report.

^{**}This adjustment also affects the prior published output per employee figures.

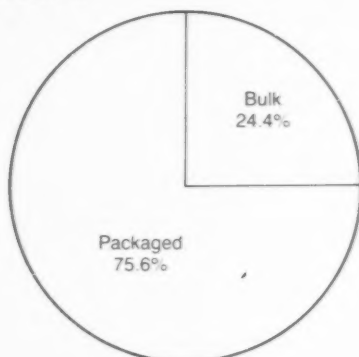
A.4 PRODUCTIVITY (SALES BASIS)



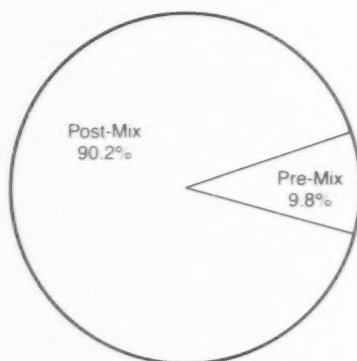
B. Market Share By Packaging Type

B.1 PACKAGING (Volume Basis)

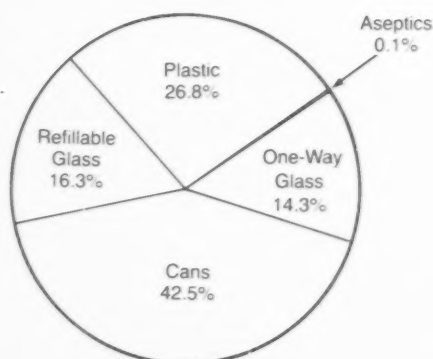
MARKET SHARES



B.2 BULK (Volume Basis)



B.3 PACKAGED (Volume Basis)



MARKET SHARES (Volume Basis)

As used in this report, the term **bulk** packaging refers to the sale of pre-mix or syrup for use with dispensers or coin operated vending machines. For 1985 bulk sales accounted for 24.4% of the total national soft drink market with packaged sales holding 75.6%. This is virtually unchanged from 1984 where the figures were 24.3% and 75.7%.

Bottler post-mix accounted for 90.2% and pre-mix accounted for 9.8% of the bulk sales. Measured against 1984, pre-mix lost 2.3 percentage points. The end result was a decrease of 18.7% in the market share of pre-mix. This is a continuation of a trend that has been going on for a number of years.

Turning to sales by package type, the market share for refillable glass was 16.3%; one-way glass, 14.3%; plastics, 26.8%; cans, 42.5%; and aseptics, 0.1%. These percentages refer to soft drink volume and not the number of units of a particular type of container. That is, out of 100 gallons of soft drinks 16.3 gallons were packaged in refillable glass, etc. The changes in percentage points from 1984 were: refillable glass, -3.8; one-way glass, -0.8; plastics, 2.6 and cans, 2.0. Aseptics stayed the same as reported in 1984. The respective percentage changes in market share were: refillable glass, -19.0%; one-way glass, -5.3%; plastics, 10.7%; and cans, 5.0%. All of the above, and Tables B.1 through B.8 that follow, are on a volume of soft drinks sold basis, not, as mentioned, on the number of containers basis. Container unit data follows in Tables B.9 through B.13.

B.4 SOFT DRINK SALES: REFILLABLE GLASS (Volume Basis)

6-12 oz.	9.2%
16 oz./½ liter	81.7%
24-32 oz./1 liter	9.1%
	100%

B.5 SOFT DRINK SALES: ONE-WAY GLASS (Volume Basis)

6-12 oz.	14.0%
16 oz./½ liter	80.5%
24-32 oz./1 liter	5.5%
	100%

*One half liter and one liter plastic are the packaging categories most susceptible to sampling error, particularly the ½ liter whose use is concentrated in only a few market areas.

**B.6 SOFT DRINK SALES:
PLASTIC CONTAINERS (Volume Basis)**

½ liter	3.9%
1 liter	3.6%
2 liter	80.5%
3 liter and larger	12.0%
	100%

**B.7 SOFT DRINK SALES:
CANS (Volume Basis)**

Aluminum	88.5%
Bi-metal	11.5%
	100%

**B.9 SOFT DRINK SALES:
PACKAGED (Unit Basis)**

Refillable Glass	17.1%
One-Way Glass	15.7%
Plastics	7.4%
Cans	59.6%
Aseptics	0.2%
	100%

**B.10 SOFT DRINK SALES:
REFILLABLE GLASS (Unit Basis)**

6-12 oz.	15.8%
16 oz./½ liter	79.6%
24-32 oz./1 liter	4.6%
	100%

**B.11 SOFT DRINK SALES:
ONE-WAY GLASS (Unit Basis)**

6-12 oz.	21.2%
16 oz./½ liter	76.2%
24-32 oz./1 liter	2.6%
	100%

**B.8 SOFT DRINK SALES:
POST-MIX BULK (Volume Basis)**

Tanks (1 and 5 gallons)	88.9%
Bag in Box	10.2%
Other	0.9%
	100%

MARKET SHARES (Unit Basis)

Tables B.9 through B.13 show the sales of soft drinks on a container unit basis. Note that on a unit basis, the can is by far the predominant soft drink container enjoying a 59.6% share of the market. This is followed by glass, plastics and aseptics.

**B.12 SOFT DRINK SALES:
PLASTIC CONTAINERS (Unit Basis)***

½ liter	14.3%
1 liter	6.4%
2 liter	72.2%
3 liter and larger	7.1%
	100%

**B.13 SOFT DRINK SALES:
CANS (Unit Basis)**

Aluminum	88.5%
Bi-Metal	11.5%
	100%

*One half liter and one liter plastic are the packaging categories most susceptible to sampling error, particularly the ½ liter whose use is concentrated in only a few market areas.

C. Changes In Soft Drink Sales By Packaging Type

C.1 BULK SALES (Volume Basis)

Pre-Mix	-15.4%
Post-Mix	6.7%

C.2 PACKAGED SALES (Volume Basis)

Refillable Glass	-15.2%
One-Way Glass	-0.9%
Plastic	15.9%
Cans	9.9%
Aseptics	0.2%

C.3 REFILLABLE GLASS (Volume Basis)

6-12 oz.	-37.2%
16 oz./½ liter	-0.4%
24-32 oz./1 liter	-57.2%

C.4 ONE-WAY GLASS SALES (Volume Basis)

6-12 oz.	-9.1%
16 oz./½ liter	0.5%
24-32 oz./1 liter	0.7%

C.5 PLASTIC SALES (Volume Basis)

½ liter	89.9%
1 liter	26.0%
2 liter	-0.0%
3 liter and larger	1287.9%

C.7 PACKAGED SALES (Unit Basis)

Refillable Glass	-14.0%
One-Way Glass	-2.9%
Plastic	18.7%
Cans	10.3%
Aseptics	103.1%

C.8 REFILLABLE GLASS (Unit Basis)

6-12 oz.	-35.4%
16 oz./½ liter	-0.7%
24-32 oz./1 liter	-60.3%

C.9 ONE-WAY GLASS (Unit Basis)

6-12 oz.	-10.7%
16 oz./½ liter	-0.4%
24-32 oz./1 liter	-5.8%

TOTAL SALES (Volume Basis)

Bulk sales were up 5.22% in 1985; lead by a 6.7% increase in post-mix offset somewhat by a -15.4% decrease in pre-mix.

Packaged sales, in volume terms, were up 4.66%, led by plastic at 15.9%. Refillable glass declined by 15.2%. One-way glass decreased by 0.9% and can sales were up by 9.9%.

The growth of soft drinks sold in plastic containers clearly was dominated by 3-liter at plus 1288%, followed by half-liter at 89.9%. (See earlier footnote on susceptibility to sampling error.) One liter plastic containers grew by 26.0%.

Among glass packages the use of the 16-ounce one-way glass and 16-oz. refillable glass bottlers held their own as did the 24-32 oz./1-liter one-way glass container. All other sizes of glass declined.

C.6 CANS (Volume Basis)

Aluminum	8.7%
Bi-Metal	20.4%

TOTAL SALES (Unit Basis)

Figure C.7 shows the change in packaging used by the soft drink industry on a unit basis. Plastics lead the increase at 18.7% if one puts aside the aseptic category. Cans grew by 10.3% on a unit basis. Glass declined. Data on individual package sizes are given in figure C.8 through C.11.

C.10 PLASTIC (Unit Basis)

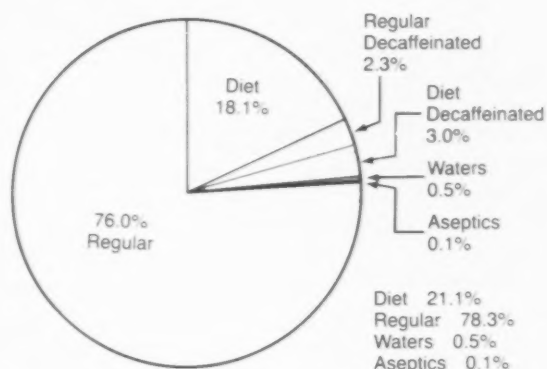
½ liter	95.6%
1 liter	27.3%
2 liter	1.1%
3 liter and larger	1304.5%

C.11 CANS (Unit Basis)

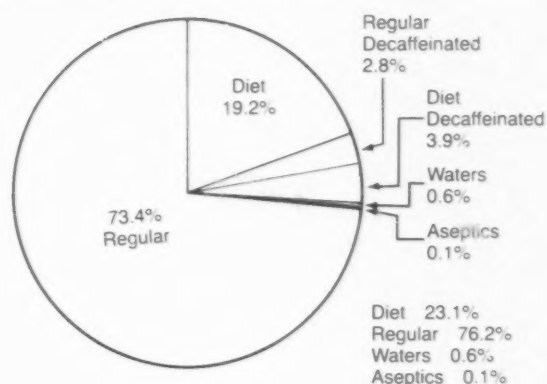
Aluminum	9.0%
Bi-Metal	21.3%

D. Market Shares By Beverage Type And Flavor

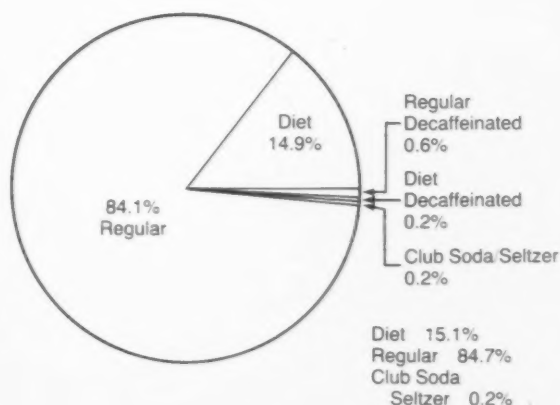
D.1 PACKAGED & BULK



D.2 PACKAGED



D.3 BULK



FLAVOR MIX

1985's flavor breakdown follows the same format as for 1983 and 1984. There are four basic categories of soft drinks: diet, regular, club soda/seltzer (this year labeled waters on the survey form and so labeled here in the relevant figures and tables), and aseptics. Within the Packaged Waters category the reported figures were 61.2% Club Soda/Seltzer; 20.4% Sparkling, Unflavored; and 18.4% Sparkling, Essence or Flavored. Bulk sales in this category were 100% Club Soda/Seltzer. Within the diet and the regular classifications data are presented delineating the decaffeinated market.

As was the case in 1984, there is more information provided on bulk categories than in prior years. For example, since flavors data are now available for two years it is possible to show percentage changes. This expansion of the data set is shown in Table D.8. Bulk flavors include sales through independent distributors.

In analyzing the data presented in tables D.5 through D.14, the reader is cautioned to note that 100% covers only the types of drinks mentioned in the particular table. These tables do not include aseptics or, unless stated, the club soda seltzer (waters) categories.

CAFFEINE FREE

An approximation of the total caffeine free market for packaged soft drinks can be made by adding the decaffeinated cola and decaffeinated pepper-type percentages to that of the lemon lime total. The result is 18.2%. This is a slight decline from the 1984 figure of 19.5%.

D.4 FLAVOR

	Packaged	Bulk	Total
Cola	67.7	73.1	69.0
Lemon Lime	11.4	11.7	11.4
Other	20.2	15.0	19.0
Waters	0.6	0.2	0.5
Aseptic	0.1	—	0.1
	100.0%	100.0%	100.0%

D.5 BEVERAGE TYPE

	Packaged	Bulk	Total
Regular	76.3	84.8	78.4
Diet	23.1	15.0	21.1
Waters	0.6	0.2	0.5
	100.0%	100.0%	100.0%

D.6 REGULAR

	Packaged	Bulk	Total
Cola	66.4	68.9	67.0
Lemon Lime	11.3	13.5	11.9
Other	22.3	17.6	21.1
	100.0%	100.0%	100.0%

D.7 DIET

	Packaged	Bulk	Total
Cola	74.1	97.5	78.2
Lemon Lime	12.0	1.9	10.3
Other	13.9	0.6	11.5
	100.0%	100.0%	100.0%

D.8 CHANGE IN FLAVOR MIX (%):

	Packaged	Bulk	Total
Regular	-2.2	-2.6	-2.3
Cola	-2.7	1.0	-1.7
Lemon Lime	-12.0	16.4	-4.9
Other	17.7	-12.7	9.2
Diet	8.9	18.4	10.4
Cola	-6.2	6.9	-3.5
Lemon Lime	-8.8	-25.6	-10.5
Other	77.8	-88.4	52.7
	100.0%	100.0%	100.0%

D.9 COLA

	Packaged	Bulk	Total
Regular	74.7	79.9	76.1
Diet	25.3	20.1	23.9
	100.0%	100.0%	100.0%

D.10 LEMON LIME

	Packaged	Bulk	Total
Regular	75.6	97.6	81.1
Diet	24.4	2.4	18.9
	100.0%	100.0%	100.0%

D.11 REGULAR COLA

	Packaged	Bulk	Total
Regular	94.5	99.4	95.8
Decaffeinated	5.5	0.6	4.2
	100.0%	100.0%	100.0%

D.12 DIET COLA

	Packaged	Bulk	Total
Regular	77.9	99.0	82.4
Decaffeinated	22.1	1.0	17.6
	100.0%	100.0%	100.0%

D.13 OTHER FLAVORS

	Packaged	Bulk	Total
Regular	81.0	96.0	83.9
Regular Decaf.	0.3	2.1	0.6
Diet	14.5	0.4	11.9
Diet Decaf.	0.8	0.2	0.6
Waters	2.9	1.3	2.6
Aseptics	0.5	0.0	0.4
	100.0%	100.0%	100.0%

**D.14 FLAVOR SUMMARY OF THE PACKAGED
SOFT DRINK MARKET IN PERCENT****Regular**

Cola	46.1
Flavored Cola	1.7
Juice Added	1.1
Lemon Lime	8.6
Orange	2.9
Ginger Ale	1.4
Grape	0.6
Root Beer	1.8
Pepper-type	3.5
Non-Carbonated	0.6
Other	5.0
Decaffeinated Cola	2.8
Decaffeinated Pepper-type	0.1
Sub-Total	76.2

Diet

Cola	13.1
Flavored Cola	0.2
Juice Added	0.9
Lemon Lime	2.8
Orange	0.3
Ginger Ale	0.2
Grape	0.0
Root Beer	0.4
Pepper-type	0.6
Non-Carbonated	0.1
Other	0.5
Decaffeinated Cola	3.8
Decaffeinated Pepper-type	0.2
Sub-Total	23.1

Club Soda/Seltzer	0.6
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Aseptics	0.1
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100%

E. Vending

E.1 VENDING: (Percent of Total)

Packaged (% of Total Packaged)	9.7%
of which: Full Service.....	38.1%
Other.....	61.9%
	100.0%
Bulk (% of Total Bulk)	2.1%
of which: Full Service.....	46.5%
Other.....	53.5%
	100.0%
Total (% of Total Sales)	8.5%

E.2 VENDING: Flavor Information

Cola	62.2%
Regular	47.5%
Diet	14.7%
Lemon Lime	12.6%
Regular	9.7%
Diet	2.9%
Other	25.2%
Regular	22.4%
Diet	2.8%
	100.0%

VENDING INFORMATION

To increase the usefulness of the estimates for vended soft drinks, the survey was redesigned. In the past, vending was listed as a sales channel, but this created a dilemma. How should you count a product that was vended in, say, a supermarket? Does it get placed in the vended or supermarket channel. What if the store fills the machine itself? To partially avoid these problems, vending was removed from the sales channel table and a separate table was placed on the survey and the bottler was asked to estimate total vended product, regardless of the actual location of the vending machine. Thus, in the above example, the estimated vended gallonage would have been included in the supermarket channel. Table E.1 is derived from the new data. It shows packaged and bulk vending estimates along with a breakdown for full-service or other account which would include an estimate for the supermarket itself filling the machine.

F. Sweeteners

F.1 HOW SOFT DRINKS ARE SWEETENED (%)

Beet/Cane Sugar	1.4%
HFCS	74.7%
Sugar + HFCS	2.1%
Aspartame	17.1%
Saccharin	0.2%
Aspartame + Saccharin	4.1%
Other Natural Sweeteners	0.0%
Natural (no sweetener added)	0.0%
Unsweetened	0.4%
	100.0%

F.2 SWEETENER USE (Quantities)

	(thousand lbs.)	(thousand lbs.)
Beet/Cane Sugar	185,700	185,700
HFCS	7,411,700	7,411,700
Aspartame	8,228	1,563,300
Saccharin	826	247,800

SWEETENER USE

No comprehensive data from other sources exist on the sweeteners used by the soft drink industry. To rectify this situation, the 1984 survey asked bottlers to provide data on how the drinks they sold were sweetened. This was continued in 1985. Percentage figures obtained, combined with data on bulk sales through independent distributors, are presented in Table F.1. Factors are applied to these percentages to yield the figures given in column 1 of Table F.2. The factors used in the diet mix are 6 parts saccharin to 3 parts aspartame with a total sweetener of 9 mg. per fluid ounce. If only saccharin is used, the calculation is based on 11 mg. per fluid ounce, while all aspartame is based on 15 mg. per fluid ounce. Column 2 of Table F.2 converts the quantity figures into sweetener equivalents based on Beet/Cane Sugar and HFCS both having a sweetener level of one; Saccharin, having a sweetener level of 300; and Aspartame, having a sweetener level of 180 to 200 (190 is used in the Table F.2 computation).

G. Aseptics

G. ASEPTIC SIZES (Volume Basis)

0-200 ml.	1.7%
201-250 ml.	74.3%
251-375 ml.	24.0%
376 ml. & larger	Trace
	100.0%

ASEPTICS

In 1983 for the first time data were requested on the amount of aseptics sold by bottlers. In 1984 bottlers were also asked for aseptic package sizes. Both were reported again this year. Aseptic packaging as a percentage of the total volume of sales is given in Section B.

H. Distribution

H.1 DISTRIBUTION CHANNELS

Home Market	Packaged	Bulk	Total
Supermarkets	43.6%	2.0%	37.7%
Grocery Stores	12.7%	5.2%	11.6%
Drug Stores	5.4%	(1)	4.7%
Convenience Stores	11.7%	(1)	10.1%
Other Home Market	6.5%	1.5%	5.8%
Total Home Market	79.9%	8.7%	69.9%
On-Premise			
Restaurants/Bars	1.8%	24.7%	5.0%
Fast Food	2.2%	26.0%	5.5%
Drug Stores	(1)	7.1%	1.0%
Convenience Stores	(1)	7.5%	1.1%
Amusement and Special Events	3.1%	9.8%	4.0%
Other On-Premise	13.0%	16.2%	13.5%
Total On-Premise	20.1%	91.3%	30.1%
Total by type	100.0%	100.0%	100.0%

(1) Explained in the last paragraph of this section.

H.2 DISTRIBUTION WITHIN CHANNELS

	Packaged	Bulk	Total
Supermarkets	99.3%	0.7%	100.0%
Grocery Stores	93.7%	6.3%	100.0%
Drug Stores	82.2%	17.8%	100.0%
Convenience Stores	90.5%	9.5%	100.0%
Other Home Market	96.4%	3.6%	100.0%
Restaurants/Bars	31.0%	69.0%	100.0%
Fast Food	33.4%	66.6%	100.0%
Amusement and Special Events	65.9%	34.1%	100.0%
Other On-Premise	83.1%	16.9%	100.0%

DISTRIBUTION*

The expanded coverage of distribution channels first offered in the 1984 survey is continued again this year. As before, a specific channel distinction is made for both packaged and bulk in the drug and convenience store channels. As a result, the home market classifications more accurately parallel those of the food stores category reported by the A. C. Nielsen Company. The Nielsen food store category is essentially the sum of NSDA's super-market, grocery, and convenience packaged classifications. The NSDA figures show this to represent 85% of the home market and 68% of total packaged goods sales. If one chooses to include bulk by point of sale, these three categories, (including bulk) by coincidence, also sum to 85% of the home market but only 59.4% of the total market for soft drinks.

The footnote (1) refers to the problem of allocating drug and convenience store volume between on-premise and home market. Bottlers do not know how much is sold for which point of consumption. Much is likely consumed "in transit" by the purchaser or taken to the place of work. The decision was to allocate all bulk to on-premise, the most likely situation. Conversely, all of the packaged was assigned to the home market, here defined as "off-premise."

*Derived from survey of bottlers. Does not include syrup distribution by food brokers or others.

I. Delivery and Method of Sale

I.1 DELIVERY AND METHOD OF SALE AND SEASONALITY (Packaged Goods)

Delivery and Method of Sale (Volume Basis)

	% of type	% of total
Delivery: Conventional Truck or Route Trailer ...	84.7%	
Which was sold by:		
Route Salesperson	63.1%	53.4%
Advance Salesperson	25.2%	25.3%
Tel-Sell	7.0%	6.0%
Total	100.0%	84.7%

Delivery: Multi-Case Modules by Transport Vehicle (bulk delivery body)	15.3%	
Which was sold by:		
Route Salesperson	11.6%	1.8%
Advance Salesperson	75.2%	11.5%
Tel-Sell	8.2%	1.2%
Other	5.9%	0.8%
Total	100.0%	15.3%
		100.0%

I.2 DELIVERY, SIZE, AND FREQUENCY

Conventional Route Trucks:	
Average Stops per Truck per Day	21.1
Average Size Delivery (physical cases)	18.7
Multi-Case Module:	
Average Stops per Truck per Day	8
Average Size Delivery (physical cases)	215

I.3 CASH VERSUS CREDIT SALES

Cash	32.0%
Credit	68.0%
Turnover Ratio:	14.25

DELIVERY AND METHOD OF SALE

1985 represented the second year data were requested on the method of sale and the method of delivery of packaged soft drinks. According to the responses, 84.7% of packaged goods were delivered by conventional truck or route trailer. Table I.1 gives data on the method of sale for these deliveries. For example, 63.1% were sold by the delivery driver/salesperson.

The term "multi-case module" refers to palletized deliveries. Within the two categories of delivery type, 15.3% of the volume of packaged goods was delivered by this method using a bulk delivery body. These data, along with the sales approach, also appear in Table I.1.

For the first time, data was requested on stops per day per route or bulk delivery transport. These data appear in Table I.2.

Table I.3, presents data on cash versus credit sales. The data on the turnover ratio have been added this year. It should be comparable to the figure derived by dividing item #1(c) by item L#2(a)(D) on a bottlers 1120 IRS tax form. Using this source, the ratio is for the end of the tax year.

The three seasonality indices shown on Table I.4 are derived from different samples. Bottlers were asked to answer in any one of the three bases: Physical Cases, Standard Cases or Dollars. However, the coverage is fairly broad so the indices, regardless of basis, should be representative. The lowest month is indexed at 1.00. It turns out that this is January on all three bases. To illustrate the interpretation, August, on the Standard Case basis is 1.70, i.e. 70% greater than January.

I.4 SEASONALITY

	Physical Case Basis	Standard Case Basis	Dollar Basis
Jan.	1.00	1.00	1.00
Feb.	1.02	1.11	1.31
Mar.	1.23	1.31	1.44
Apr.	1.29	1.51	1.22
May	1.55	1.50	1.47
June	1.55	1.50	1.47
July	1.55	1.70	1.44
Aug.	1.55	1.70	1.44
Sept.	1.60	1.59	1.20
Oct.	1.57	1.45	1.18
Nov.	1.30	1.19	1.06
Dec.	1.23	1.06	1.15

J. Vehicle Use and Vehicle Productivity

J.1 VEHICLES USED

	Percent of total
Delivery Trucks	57.9
Transports	6.5
Vans, etc.	
Supervisors	17.1
Advance Salesperson	9.3
Service Department	9.2
Total	100.0%

J.2 VEHICLE PRODUCTIVITY

Method of Delivery and Sales	Cases per truck per year	
	Standard	Physical
100% conventional delivery; 100% conventional sales	56,200	47,000
100% conventional delivery; 100% advanced sales	74,300	62,400
Per truck (counting all delivery and transports used for trade). For bottlers whose multi-case module deliveries account for more than 25% of all trade deliveries	107,500	89,580

J.3 FEDERAL HEAVY VEHICLE TAX

Federal Heavy Vehical Tax per Truck that is taxed	\$288
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VEHICLE USE AND PRODUCTIVITY

The data appearing in Tables J.1 through J.3 are derived from the responses to combined analysis of the vehicle ownership, "how sold and how delivered" portions of the survey. There is one delivery truck (conventional or route trailer) for each 56.2 thousand standard 288 oz. cases delivered by bottlers who do not deliver in multi-case modules and who sell 100% conventional. Combining 100% advanced sales with 100% conventional delivery reduces the number of route trucks or route trailers to one for every 74.3 thousand 288 oz. cases. For those bottlers who utilized multi-case module delivery involving transport vehicles for 25% or more of their delivery to the trade, truck utilization increases to 107.5 thousand 288 oz. cases per vehicle, counting both delivery trucks and transports used to make multi-case module drops. As an approximation, divide by 1.2 to convert standard 288 oz. cases to physical cases. The average number of delivery trucks per supervisor's vehicle is 3.4. On average there is one advance sales vehicle per 207,800 standard 288 oz. cases sold in this manner. Again, on average there is one service department vehicle for 6.2 delivery trucks.

K. Productivity

K.1 PRODUCTIVITY AS A FUNCTION OF THE SALES TO PRODUCTION RATIO (Packaged Goods Only)

Sales/Production Ratios greater than 1.2

Sales Dollars/Employee	\$126,600
Sales Gallons/Employee	52,500
Standard 288 oz. Case/Employee	23,350
Physical Cases/Employee	19,000

Sales/Production Ratios in the range 1.2 or less and equal to or greater than 0.8

Sales Dollars/Employee	\$126,000
Sales Gallons/Employee	49,200
Standard 288 oz. Case/Employee	21,860
Physical Cases/Employee	18,500

Sales/Production Ratios less than 0.8

Sales Dollars/Employee	\$111,600
Sales Gallons/Employee	44,600
Standard 288 oz. Case/Employee	19,800
Physical Cases/Employee	16,500

PRODUCTIVITY

In 1985 Sales Survey responses were solicited on a state specific basis for both sales and production. These data were used to provide additional specificity to the industry average sales dollar per employee and sales volume per employee data given earlier. As in earlier years, these data are divided into three classifications: Whether the particular organization sold more than it produced in the state on which a particular response is based, whether they sold approximately the same amount as they produced or whether they produced more than they sold in the relevant state. Table K.1 gives this data. Four relationships are shown: Sales dollars per employee, sales gallons per employee, standard 288 ounce cases per employee and physical cases per employee. All are computed for packaged goods only. In calculating these relationships, the data are weighted, i.e., forms with larger amounts of sales are given proportionally greater weight in the computation than those with lesser sales.

L. Typical Response

L.1 GROWTH PERCENTAGES

Volume Growth	4.6%
Sales Dollar Growth	8.6%
Employment Growth	3.5%

L.2 PACKAGE MIX

Refillable Glass	25.3%
One-Way Glass	6.3%
Plastic	24.9%
Cans	43.5%

L.3 FLAVORS (Packaged and Bulk Combined)

Cola	70.0%
Lemon Lime	12.6%
Other	17.4%

L.4 PRODUCTIVITY

Sales Volume/employee	57,700 gallons (25,645 standard 288 oz. cases)
Sales Dollars/Employee	\$132,286
Growth Sales Volume/Employee	0.7%
Growth Sales Dollars/Employee	5.0%

L.5 SALES

Sales Volume	16,790,842 gallons (7,462,596 standard 288 oz. cases)
Sales Dollars	\$38,538,133

TYPICAL RESPONSE AND INDUSTRY AVERAGES DIFFER

All data presented in the earlier sections of this report represent industry averages. In deriving those averages each response was given a weight in proportion to its sales volume. In this section each response is given an equal weight, i.e., a weight of one regardless of the amount of sales volume reported.

REGIONAL DATA

Northeastern Region

Connecticut
Delaware
District of Columbia
Maine
Maryland
Massachusetts
New Hampshire
New Jersey
New York
Pennsylvania
Rhode Island
Vermont



East Central Region

Illinois
Indiana
Kentucky
Michigan
Ohio
West Virginia
Wisconsin



West Central Region

Iowa
Kansas
Minnesota
Missouri
Nebraska
North Dakota
South Dakota



Southern Region

Alabama
Arkansas
Florida
Georgia
Louisiana
Mississippi
North Carolina
South Carolina
Tennessee
Virginia



Western Region

Colorado
Idaho
Montana
Nevada
Utah
Wyoming



Pacific Region

Alaska
California
Hawaii
Oregon
Washington



Southwestern Region

Arizona
New Mexico
Oklahoma
Texas



Regional Summary Data

CHANGE FROM PREVIOUS YEAR (ALL FIGURES IN PERCENT)

	Northeastern	Southern	East Central	West Central	Southwestern	Western	Pacific
Total Volume	6.10	7.65	6.66	-0.59	5.86	6.31	1.11
Packaged Volume	5.67	8.48	7.38	-1.91	6.14	6.00	1.19
Bulk Volume	8.46	2.88	2.41	4.57	4.60	7.69	0.76
Total Dollar Value	12.23	11.11	14.02	7.47	5.65	5.02	6.05
Packaged Dollar Value	12.33	11.46	14.85	7.66	5.76	4.83	6.20
Bulk Dollar Value	10.75	5.69	0.80	5.25	4.42	7.87	3.72
Employment	2.31	4.00	2.66	0.66	1.60	2.12	5.13

*Regional data are more affected by sample size variation and differences in respondents between the two years necessary for the calculation of growth rates than is the case with the national data. Regional data are for the bottler portion of the market only.

MARKET SHARES (ALL FIGURES IN PERCENT) (VOLUME BASIS)

	Northeastern	Southern	East Central	West Central	Southwestern	Western	Pacific
1. Market Share By Market Type							
Packaged	88.8	84.7	86.7	78.7	81.3	76.4	80.4
Bulk	11.2	15.3	13.3	21.3	18.7	23.6	19.6
	100.0	100.0	100.0	100.0	100.0	100.0	100.0
2. Bulk							
Pre-Mix	13.9	15.7	10.4	12.0	5.9	5.6	6.0
Post-Mix	86.1	84.3	89.6	88.0	94.1	94.4	94.0
	100.0	100.0	100.0	100.0	100.0	100.0	100.0
3. Packaged							
Refillable Glass	4.2	15.2	40.9	20.1	5.9	7.8	6.5
One-Way Glass	17.5	14.3	6.1	8.5	15.0	14.2	14.5
Plastics	42.2	33.3	18.7	28.1	24.6	14.2	12.9
Cans	36.1	37.2	34.0	43.0	54.5	63.7	65.9
Aseptics	0.0	0.0	0.3	0.3	0.0	0.1	0.2
	100.0	100.0	100.0	100.0	100.0	100.0	100.0
4. Refillable Glass							
6-12 oz.	11.9	24.3	2.0	13.5	29.8	10.7	3.2
16 oz. 0.5 liter	67.7	62.2	96.6	81.2	13.6	88.3	88.3
24-32 oz.	20.4	13.5	1.4	5.3	56.6	1.0	8.5
	100.0	100.0	100.0	100.0	100.0	100.0	100.0
5. One-Way Glass							
6-12 oz.	9.0	26.4	12.4	11.6	11.5	9.6	12.1
16 oz. 0.5 liter	89.1	70.5	85.8	84.1	85.7	81.3	69.1
24-32 oz.	1.9	3.1	1.8	4.3	2.8	9.1	18.8
	100.0	100.0	100.0	100.0	100.0	100.0	100.0
6. Plastic							
0.5 liter	2.7	4.9	3.2	9.2	5.1	0.6	4.8
1 liter	11.0	.6	1.4	2.8	0.5	0.5	0.0
2 liter	72.8	80.4	82.7	83.9	75.9	85.3	90.9
3 liter and larger	13.5	14.1	12.7	4.1	18.5	13.6	4.3
	100.0	100.0	100.0	100.0	100.0	100.0	100.0
7. Cans							
Aluminum	92.5	94.4	97.9	87.9	83.3	100.0	100.0
Bi-Metal	7.5	5.6	2.1	12.1	16.7	0.0	0.0
	100.0	100.0	100.0	100.0	100.0	100.0	100.0
8. Package Growth							
Refillable Glass	-33.0	-19.0	-4.1	-9.8	-26.6	44.1	-45.7
One-Way Glass	11.7	-2.9	9.8	-18.6	-0.6	-9.8	26.1
Plastics	3.2	41.6	20.1	3.6	16.2	2.0	0.4
Can	13.4	5.7	17.3	2.2	9.2	7.5	5.5
9. Packaged & Bulk Flavor Type							
Regular	71.6	78.4	73.5	74.0	79.8	70.6	73.4
Regular Decaffeinated	3.1	1.8	3.6	2.8	1.7	2.2	2.9
Total Regular	74.7	80.2	77.1	76.8	81.5	72.8	76.3
Diet	20.2	16.0	18.3	18.6	16.0	22.1	19.4
Diet Decaffeinated	4.0	3.5	4.1	3.9	2.2	3.8	2.9
Total Diet	24.2	19.5	22.4	22.5	18.2	25.9	22.3
Waters	1.1	0.3	0.2	0.5	0.3	1.2	1.2
Aseptics	0.0	0.0	0.3	0.2	0.0	0.1	0.2
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0
10. Packaged Flavor Type							
Regular	70.5	76.8	71.9	70.5	77.9	68.0	69.9
Regular Decaffeinated	3.4	2.1	4.1	3.2	1.8	2.5	2.9
Total Regular	73.9	78.9	76.0	73.7	79.7	70.5	72.8
Diet	20.6	16.8	18.7	20.7	17.4	22.9	21.5
Diet Decaffeinated	4.4	4.1	4.8	4.9	2.6	4.9	3.9
Total Diet	25.0	20.9	23.5	25.6	20.0	27.8	25.4
Waters	1.0	0.2	0.2	0.4	0.3	1.6	1.6
Aseptics	0.0	0.0	0.3	0.3	0.0	0.1	0.2
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0
11. Bulk Flavor Type							
Regular	80.9	87.5	83.8	86.1	88.2	78.8	83.2
Regular Decaffeinated	1.1	0.4	0.4	1.3	1.3	1.1	3.0
Total Regular	82.0	87.9	84.2	87.4	89.5	79.9	86.2
Diet	17.1	11.4	15.1	11.5	9.9	19.5	13.4
Diet Decaffeinated	0.4	0.2	0.4	0.4	0.4	0.3	0.1
Total Diet	17.5	11.6	15.5	11.9	10.3	19.8	13.5
Waters	0.5	0.5	0.3	0.7	0.2	0.3	0.3
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0

MARKET SHARES (ALL FIGURES IN PERCENT) (VOLUME BASIS)

	Northeastern Region			Southern Region			East Central Region		
	Packaged	Bulk	Total	Packaged	Bulk	Total	Packaged	Bulk	Total
12. Flavor									
Cola	71.7	73.9	71.9	74.3	70.0	73.6	74.8	72.7	74.5
Lemon Lime	8.6	11.3	8.9	10.2	11.5	10.4	7.0	9.9	7.4
Waters	1.1	0.5	1.1	0.2	0.5	0.3	0.2	0.3	0.2
Aseptics	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.3
Other	18.6	14.3	18.1	15.3	18.0	15.7	17.7	17.1	17.6
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
13. Beverage Type									
Regular	73.8	82.0	74.8	78.9	87.8	80.2	76.2	84.3	77.3
Diet	25.1	17.5	24.2	20.9	11.7	19.5	23.6	15.4	22.5
Waters	1.1	0.5	1.0	0.2	0.5	0.3	0.2	0.3	0.2
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
14. Regular									
Cola	69.7	69.6	69.7	72.1	66.9	71.2	72.9	68.5	72.3
Lemon Lime	8.7	13.0	9.3	10.3	12.9	10.7	7.0	11.3	7.6
Other	21.6	17.4	21.0	17.6	20.2	18.1	20.1	20.2	20.1
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
15. Diet									
Cola	80.4	96.6	81.8	83.4	96.3	84.5	82.5	97.5	83.9
Lemon Lime	8.6	3.3	8.1	9.8	1.5	9.1	7.3	2.1	6.9
Other	11.0	0.1	10.1	6.8	2.2	6.4	10.2	0.4	9.2
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
16. Cola									
Regular	71.9	77.2	72.5	76.6	84.0	77.6	74.1	79.4	74.8
Diet	28.1	22.8	27.5	23.4	16.0	22.4	25.9	20.6	25.2
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
17. Lemon Lime									
Regular	75.0	94.9	77.9	79.8	98.5	83.0	75.4	96.6	79.2
Diet	25.0	5.1	22.1	20.2	1.5	17.0	24.6	3.4	20.8
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
18. Regular Cola									
Regular	93.5	98.2	94.1	95.9	99.5	96.9	92.6	99.4	93.5
Decaffeinated	6.5	1.8	5.9	4.1	0.5	3.1	7.4	0.6	6.5
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
19. Diet Cola									
Regular	78.5	97.9	80.4	77.2	98.3	79.4	75.5	97.7	77.9
Decaffeinated	21.5	2.1	19.6	22.8	1.7	20.6	24.5	2.3	22.1
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
20. Seasonality Index	Physical Case Basis	Standard Case Basis	Dollar Basis	Physical Case Basis	Standard Case Basis	Dollar Basis	Physical Case Basis	Standard Case Basis	Dollar Basis
Jan.	1.00	1.00	1.00	1.02	1.00	1.00	1.00	1.00	1.00
Feb.	1.01	1.17	1.12	1.00	1.18	1.21	1.04	1.37	1.40
Mar.	1.23	1.18	1.41	1.33	1.23	1.39	1.21	1.47	1.48
Apr.	1.24	1.56	1.18	1.38	1.50	1.26	1.17	1.73	1.21
May	1.51	1.26	1.50	1.50	1.36	1.31	1.30	1.44	1.56
June	1.51	1.26	1.50	1.50	1.36	1.31	1.30	1.44	1.56
July	1.43	1.78	1.49	1.62	1.57	1.44	1.49	1.78	1.42
Aug.	1.43	1.78	1.49	1.62	1.57	1.44	1.49	1.78	1.42
Sept.	1.58	1.71	1.09	1.49	1.52	1.28	1.57	1.49	1.19
Oct.	1.61	1.33	1.13	1.58	1.23	1.16	1.35	1.47	1.20
Nov.	1.36	1.33	1.01	1.32	1.20	1.04	1.39	1.32	1.08
Dec.	1.28	1.27	1.10	1.25	1.11	1.13	1.13	1.32	1.16

Note: *Not reported

MARKET SHARES (ALL FIGURES IN PERCENT) (VOLUME BASIS)

West Central Region			Southwestern Region			Western Region			Pacific Region		
Packaged	Bulk	Total	Packaged	Bulk	Total	Packaged	Bulk	Total	Packaged	Bulk	Total
60.8	62.2	61.2	65.4	60.5	64.5	65.1	67.1	65.6	60.5	64.7	61.6
17.0	13.5	16.2	10.1	10.8	10.2	16.6	15.7	16.4	19.3	13.1	17.7
0.4	0.7	0.5	0.3	0.2	0.3	1.6	0.3	1.3	1.5	0.3	1.2
0.3	0.0	0.2	0.0	0.0	0.0	0.1	0.0	0.1	0.3	0.0	0.2
21.5	23.5	21.9	24.2	28.6	25.0	16.6	16.9	16.6	18.4	21.9	19.3
100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
74.0	87.4	77.0	79.7	89.4	81.5	70.6	79.9	72.8	73.0	86.1	76.5
25.6	11.9	22.5	20.0	10.4	18.3	29.8	19.8	25.9	25.5	13.6	22.3
0.4	0.7	0.5	0.3	0.2	0.2	1.6	0.3	1.3	1.5	0.3	1.2
100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
59.4	58.4	59.2	64.6	57.1	63.1	63.2	59.6	62.3	59.8	59.8	59.8
17.2	14.8	16.6	10.2	11.3	10.4	17.7	19.3	18.1	19.9	14.9	18.4
23.4	26.8	24.2	25.2	31.6	26.5	19.1	21.1	19.6	20.3	25.3	21.8
100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
66.8	93.9	70.0	69.8	89.9	71.9	73.7	98.4	78.2	66.9	97.3	71.7
16.8	5.3	15.4	9.5	6.7	9.3	15.0	1.5	12.5	19.0	2.1	16.3
16.4	0.8	14.6	20.6	3.4	18.8	11.3	0.1	9.3	14.1	0.6	12.0
100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
71.9	82.1	74.2	78.7	84.5	79.7	68.5	71.0	69.1	71.9	79.6	74.0
28.1	17.9	25.8	21.3	15.5	20.3	31.5	29.0	30.9	28.1	20.4	26.0
100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
74.7	95.4	78.6	81.1	93.5	83.4	75.0	98.1	80.3	75.1	97.9	79.5
25.3	4.6	21.4	18.4	6.5	16.6	25.0	1.9	19.7	24.9	2.1	20.5
100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
92.8	97.5	94.0	96.6	99.4	97.1	94.5	97.9	95.3	94.2	97.9	95.3
7.2	2.5	6.0	3.4	0.6	2.9	5.5	2.1	4.7	5.8	2.1	4.7
100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
73.0	96.8	76.8	84.6	97.5	86.3	76.5	98.3	81.5	77.7	98.8	82.2
27.0	3.2	23.2	15.4	2.5	13.7	23.5	1.7	18.5	22.3	1.2	17.8
100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Physical Case Basis	Standard Case Basis	Dollar Basis	Physical Case Basis	Standard Case Basis	Dollar Basis	Physical Case Basis	Standard Case Basis	Dollar Basis	Physical Case Basis	Standard Case Basis	Dollar Basis
1.10	1.03	*	1.00	*	*	1.00	*	*	1.00	1.00	*
1.00	1.15	*	1.21	*	*	1.18	*	*	1.15	1.19	*
1.14	1.33	*	1.30	*	*	1.12	*	*	1.35	1.39	*
1.33	1.59	*	1.37	*	*	1.37	*	*	1.50	1.56	*
1.87	1.43	*	1.75	*	*	1.57	*	*	1.67	1.65	*
1.87	1.43	*	1.75	*	*	1.57	*	*	1.67	1.65	*
1.67	1.81	*	1.58	*	*	1.44	*	*	1.79	1.80	*
1.67	1.81	*	1.58	*	*	1.44	*	*	1.79	1.80	*
1.97	1.42	*	1.53	*	*	1.48	*	*	1.78	1.74	*
1.54	1.34	*	1.92	*	*	1.84	*	*	1.73	1.59	*
1.11	1.13	*	1.39	*	*	1.18	*	*	1.62	1.25	*
1.23	1.00	*	1.35	*	*	1.22	*	*	1.37	1.07	*

MARKET SHARES (ALL FIGURES IN PERCENT) (VOLUME BASIS)

	Northeastern	Southern	East Central	West Central	Southwestern	Western	Pacific
21. FLAVOR SUMMARY							
Regular							
Cola	45.8	52.6	49.9	39.5	47.9	40.2	39.7
Flavored Cola	2.3	2.2	1.4	1.1	1.8	1.9	1.3
Juice Added	1.3	0.4	1.0	1.2	1.6	1.5	1.8
Lemon Lime	6.5	8.1	5.3	12.7	8.2	12.5	14.5
Orange	4.1	2.0	1.7	1.8	2.7	2.1	3.1
Ginger Ale	3.4	0.7	1.2	0.9	0.6	1.1	0.5
Grape	0.8	0.8	0.1	0.3	0.8	0.8	0.3
Root Beer	1.6	0.8	1.4	2.0	2.2	2.5	2.2
Pepper-type	1.0	4.7	1.5	4.6	8.0	1.8	1.9
Non-Carbonated	0.9	0.2	0.5	0.3	0.6	0.7	1.1
Other	2.7	4.3	7.9	6.3	3.5	2.8	3.6
Decaffeinated Cola	3.4	2.1	4.1	3.1	1.8	2.5	2.5
Decaffeinated Pepper-type	0.0	0.0	0.0	0.0	0.0	0.1	0.3
Sub-Total	73.8	78.9	76.0	73.7	79.7	70.5	72.8
Diet							
Cola	15.7	13.3	14.5	12.4	11.7	15.7	12.7
Flavored Cola	0.1	0.1	0.1	0.1	0.1	0.0	0.5
Juice Added	1.1	0.3	0.7	1.7	1.4	1.1	1.5
Lemon Lime	2.1	2.1	1.7	4.3	1.9	4.2	4.8
Orange	0.4	0.1	0.2	0.4	0.2	0.5	0.4
Ginger Ale	0.3	0.1	0.6	0.1	0.1	0.1	0.0
Grape	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Root Beer	0.4	0.0	0.4	0.4	0.2	0.5	0.7
Pepper-type	0.3	0.7	0.3	0.9	1.2	0.4	0.4
Non-Carbonated	0.1	0.0	0.0	0.0	0.5	0.0	0.0
Other	0.2	0.1	0.3	0.4	0.1	0.4	0.5
Decaffeinated Cola	4.3	4.0	4.7	4.6	2.1	4.8	3.8
Decaffeinated Pepper-type	0.1	0.1	0.0	0.3	0.5	0.1	0.1
Sub-Total	25.1	20.9	23.5	25.6	20.0	27.8	25.4
Club Soda/Seltzer	1.1	0.2	0.2	0.4	0.3	1.6	1.5
Aseptics	0.0	0.0	0.3	0.3	0.0	0.1	0.3
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0

MARKET SHARES (ALL FIGURES IN PERCENT) (VOLUME BASIS)

	Northeastern Region		Southern Region		East Central Region	
	Packaged	Bulk	Packaged	Bulk	Packaged	Bulk
22. Distribution						
Supermarkets	42.4	0.1	31.4	0.2	42.6	0.1
Grocery Stores	18.6	0.1	9.9	2.9	11.0	0.0
Drug Stores	4.8	0.0	3.6	3.9	5.3	0.1
Convenience Stores	7.1	0.3	9.8	0.7	11.3	0.1
Other Home Pkg Outlets	4.9	0.7	6.2	0.1	6.0	0.0
Amusements	1.2	0.9	3.5	1.8	2.3	1.0
Restaurants Bars	1.2	4.2	1.8	3.1	1.8	2.4
Fast Food	1.7	0.9	2.0	2.4	1.1	2.1
Other On-Premise	8.9	2.0	14.7	2.0	9.6	3.2
Total	90.8	9.2	82.9	17.1	91.0	9.0

	West Central Region		Southwestern Region	
	Packaged	Bulk	Packaged	Bulk
22. Distribution (cont.)				
Supermarkets	26.1	0.1	44.9	0.2
Grocery Stores	16.0	0.1	4.7	0.0
Drug Stores	3.3	0.0	4.1	0.1
Convenience Stores	5.7	2.7	12.3	1.7
Other Home Pkg Outlets	2.1	0.2	3.5	0.3
Amusements	4.6	0.8	2.1	1.8
Restaurants Bars	1.2	4.6	0.7	4.2
Fast Food	4.1	10.9	0.3	2.2
Other On-Premise	14.4	3.1	15.5	1.4
Total	77.5	22.5	88.1	11.9

	Western Region		Pacific Region	
	Packaged	Bulk	Packaged	Bulk
22. Distribution (cont.)				
Supermarkets	34.6	0.4	40.9	0.7
Grocery Stores	10.3	0.5	9.7	0.1
Drug Stores	5.0	0.5	4.7	0.1
Convenience Stores	12.5	3.6	9.2	1.0
Other Home Pkg Outlets	4.9	0.2	7.3	0.2
Amusements	4.5	2.5	1.4	1.7
Restaurants/Bars	0.9	5.8	1.5	2.9
Fast Food	2.4	2.7	1.4	6.1
Other On-Premise	7.5	1.2	7.1	4.0
Total	82.6	17.4	83.2	16.8

Estimated Annual Production and Consumption of Soft Drinks

Year	Total Value \$ (Wholesale)	Total Cases (288 ounce)	Per capita (12 oz. containers)
1985	23,268,791,000	4,836,730,000	486.2
1984	21,488,188,000 (see note)	4,613,380,000	469.0
1983	19,444,564,000 (see note)	4,274,274,000	438.4
1982	21,156,140,000	4,065,815,000	419.5
1981	20,015,269,000	3,959,697,000	412.3
1980	17,676,648,000	3,816,575,000	401.0
1979	14,972,628,000	3,664,500,000	389.0
1978	13,344,588,000	3,490,000,000	375.0
1977	11,526,810,000	3,247,722,000	353.0
1976	10,375,167,000	2,952,474,700	324.0
1975	9,397,797,600	2,610,499,300	289.0
1974	7,827,131,000	2,532,007,300	283.0
1973	6,223,156,500	2,514,406,700	284.0
1972	5,683,820,000	2,360,944,700	269.0
1971	5,346,960,000	2,235,743,300	258.0
1970	4,799,784,000	2,064,423,300	241.0
1969	4,369,664,000	1,942,073,300	229.6
1968	4,165,552,000	1,851,356,700	221.1
1967	3,458,632,000	1,646,968,000	198.7
1966	3,175,980,000	1,568,391,300	191.3
1965	2,735,567,000	1,402,854,700	172.7
1964	2,533,167,000	1,299,060,000	161.9
1963	2,341,189,000	1,200,601,000	151.6
1962	2,001,016,800	1,111,676,000	142.3
1961	1,829,083,200	1,016,157,300	132.2
1960	1,698,025,600	984,362,700	128.0
1959	1,633,015,900	989,706,700	133.2
1958	1,427,463,500	906,326,000	124.3
1957	1,347,241,500	907,233,300	126.1
1956	1,308,000,000	880,809,300	125.9
1955	1,252,276,000	843,283,300	122.8
1954	1,166,605,000	784,449,300	116.1
1953	1,089,513,000	785,234,700	118.3
1952	1,019,295,000	755,033,300	116.0
1951	939,442,500	695,833,300	108.5
1950	876,532,600	667,834,300	105.3
1949	860,959,300	675,262,200	108.0
1948	835,157,300	673,242,500	109.6
1947	745,676,000	601,109,300	100.6
1946	617,168,600	514,307,200	88.2
1945	584,994,000	487,495,000	88.6
1939	361,690,917	321,997,120	59.1
1929	214,322,238	181,618,990	35.4
1919	135,341,000	112,784,100	25.6
1909	43,508,000	41,436,200	10.8
1899	23,269,000	28,854,450	8.1
1889	14,354,000	17,398,800	6.6
1879	4,742,000	6,322,700	3.0
1869	4,222,000	5,629,300	4.3
1859	1,415,000	1,886,700	1.5
1849	760,000	1,013,300	1.1

NOTE: 1985 mid-year Resident Population was 238,740,000 according to U.S. Bureau of the Census. For purposes of this report, soft drink sales for the industry as a whole are expressed in cases of 24 twelve-ounce containers. Beginning in 1983 sales value was explicitly requested as "net of volume discounts and price off." The result was a definitional revision to the 1983 wholesale dollar value data. The dollar figure shown in the 1983 survey was \$20,562,545,000. As this represented 7.1% growth from 1982, 1982 would have been \$19,201,919,270. In 1984 yet another revision was made to the 1983 dollar figure. The 1983 total sales figure was changed to \$20,131,180,000. This year the 1984 figure is restated to the figure shown above from \$22,231,238,000. This results in a further restatement of 1983 to that shown in the table. The restated 1982 figure is \$18,155,222,800.

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